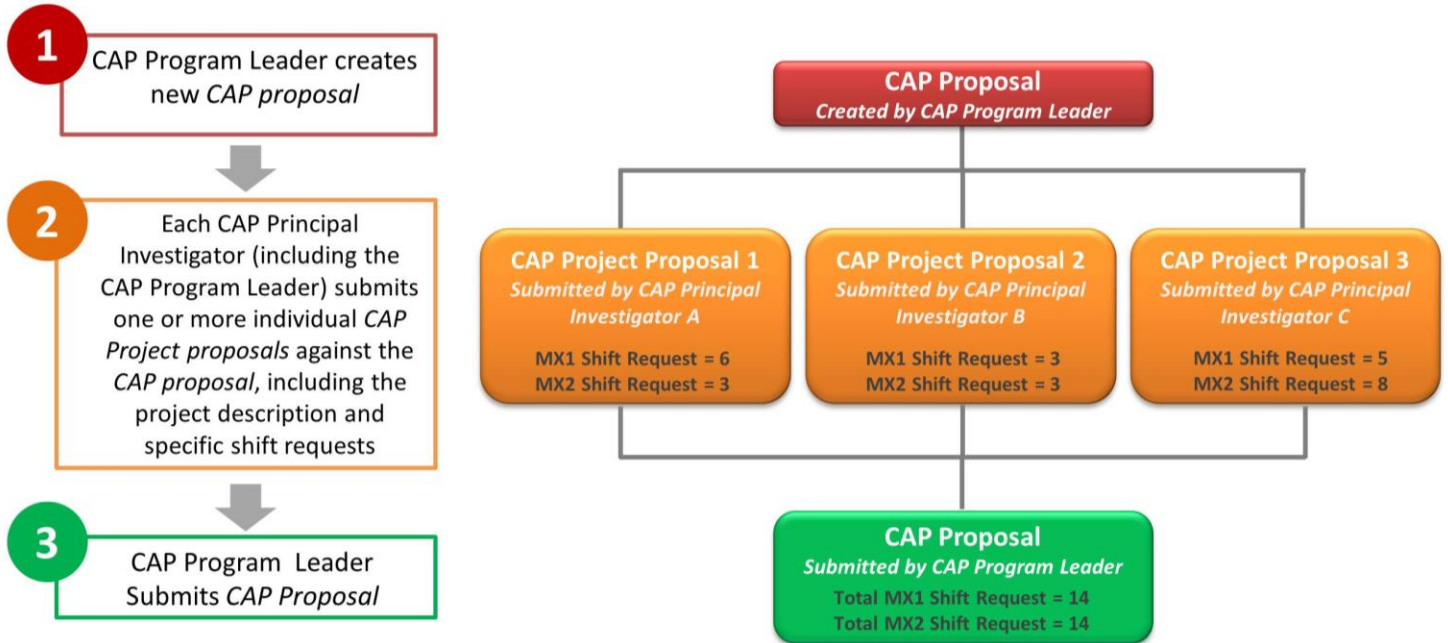


CAP SUBMISSION PROCEDURE

PROCESS OVERVIEW



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PROCESS OVERVIEW1

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USER ROLES DEFINED

User Role	Description	Permissions
CAP Program Leader	The CAP Program Leader is like the 'Chief Executive Officer' or 'Director' of the CAP and is responsible for submitting the proposal and integrating all of the projects in the CAP into a cohesive and functional program. monitor	<ul style="list-style-type: none"> • Create/edit/submit CAP proposal • Add/Delete CAP Principal Investigators • View/edit/submit all associated Project Proposals
CAP Principal Investigator	Formerly 'CAP PIs' the CAP Principal Investigators are the individual project and/or group leaders within the CAP and are responsible for submitting one or more CAP Project proposals against the CAP.	<ul style="list-style-type: none"> • Create/edit/finalise CAP Project Proposals • Add/Delete CAP staff members to Project proposal • View CAP proposal and all CAP Project proposals
CAP Coordinator	The CAP coordinator is like the 'Chief Operating Officer' and 'Chief Financial Officer' of the CAP. They are responsible for coordinating the beamtime visits, including personnel and samples, and the submission of pre-beamtime paperwork to the User Office. Further to this, the primary CAP coordinator has control over any travel funds allocated to the CAP and has ultimate responsibility for reconciling the reimbursement of travel expenses to each organisation affiliated with the CAP. Once the CAP proposal is approved there may be an opportunity to assign assistant CAP Coordinators.	
Postdoc	The CAP staff members are the research associates, postdocs, students and administrative staff that encompass the groups of the CAP Principal Investigators.	<ul style="list-style-type: none"> • View CAP proposal and all CAP Project proposals • Edit CAP Project proposal
PhD Student		
MSc Student		
Undergrad Student		
Research Associate		
Other		

CAP SUBMISSION PROCEDURE

CREATING THE CAP PROPOSAL (CAP PROGRAM LEADER)

The CAP proposal must be generated by the CAP Program Leader. To create the CAP proposal, log into the Portal and follow the link 'Create a new Proposal' from the Dashboard view:



Enter the title of the CAP, select beamline(s) and the round and click 'Next':

Beamtime Proposal Stage 1:

Expt Title *

Instrument

Equipment Set Id

[Show/Hide Details of Available Instruments](#)

Round Details

Round *

[Show/Hide Details of Current Rounds](#)

CAP SUBMISSION PROCEDURE

Confirm the details of the CAP and click 'Create'.

Please confirm the information you have entered. You cannot change the Proposal Type once you have created the proposal. If you have made a mistake, select 'Back' to return and select again.

Expt Title	Title of CAP
Round	2014/x CAP (Test)
Equipment Set	MX1: Macromolecular Crystallography/MX2: Micro Crystallography
Proposal Type	Collaborative Access Programs

Complete the questions on the 'Experiment' tab.

Adding Principal Investigators to the Proposal

On the 'Researchers' tab, add the **CAP Principal Investigators**. DO NOT include staff members associated with these group leaders, or your own group at this stage - these researchers can be added to the individual CAP Project proposals that will be created separately.

Home > CAP8130: Test CAP Proposal 7/4/14

CAP8130: Test CAP Proposal 7/4/14

Researchers

Only the principal scientist is able to submit the proposal. For CAP proposals only the CAP Leader can submit the proposal.

How to add CAP Project Leaders to this CAP
Please add only those scientists that will lead one or more projects associated with this CAP. These scientists should be added with the user role 'CAP Project Leader'. Do not add your own team/staff members, nor those of the CAP Project Leaders; these scientists will be added to the individual CAP Project proposals which will detail the projects housed under the CAP umbrella.

How to assign the role of CAP Coordinator
Where one of the CAP Project Leaders is to act as the CAP Coordinator, check the 'Is Coordinator' radio button next to their name.

Where the CAP Coordinator will not be one of the CAP Project Leaders, add the individual to the proposal with the user role 'CAP Coordinator' and check the 'Is Coordinator' radio button next to their name.

How to notify Project Leaders that they have been added to this CAP
When you have added all of the Project Leaders to this proposal click the 'Send Email' button corresponding to each Project Leader. This will advise the researcher that they have been added to this proposal and that they must submit an associated CAP Project proposal detailing their individual project/s.

Displaying 1-1 of 1 result(s).

Name	User Role	Is Coordinator	Attending Exp	
Glyn Devlin1 (Australian Synchrotron)	CAP Leader	<input checked="" type="radio"/>	Yes <input type="button" value="v"/>	<input type="button" value="Send Email"/>

Provide the researchers involved in the experiment. A Co-proposer (editor) can edit the proposal on-line. A normal Co-proposer does not have editing access, but could be part of the experiment team.

There must be one and only one principal scientist.

CAP Proposal Roles

The CAP main proposer should be added to this proposal as the 'CAP Leader'. There should be ONLY one CAP Leader assigned per CAP and ONLY the CAP Leader can submit this proposal.

All CAP lead researchers (ie. group/project leaders) should be added to this proposal as 'CAP Project Leaders'. DO NOT include staff members associated with these group leaders, or your own group - these researchers can be added to the individual CAP Project proposals which will detail the projects housed under the CAP umbrella.

The CAP Coordinator will manage the administration of the CAP program and act as the point of contact with the Australian Synchrotron User Office. ONLY one CAP Coordinator can be assigned per CAP. Should your CAP proposal be successful you may have an opportunity to assign additional

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CAP SUBMISSION PROCEDURE

To add a CAP Principal Investigator, click 'Add Co-Proposal Scientist', enter a family name or an email address to search for the co-proposer in the Portal:

Detail view ✕

Create Proposal Scientist

ℹ If you know the email of the person you want to add, as it was registered in this portal, please enter it here.

Email address

ℹ Otherwise, enter the first letters of their surname.

Surname

We have found one or more records that may correspond to this information. If the details are contained here, please select that record. Otherwise, you may choose to create a new account (or search again).

Total 1 result(s).

Name	Active Account	
Donna Popov (Australian Synchrotron)	Yes	USE

If you cannot find the account of the person you were searching for, you may create it yourself.

User Role *

Attending Exp

Ensure that the 'CAP Principal Investigator' User Role is selected, and click 'Use' to add the researcher to the proposal.

Displaying 1-5 of 5 result(s).

Name	User Role	Is Coordinator	Attending Exp		
Cathy Harland (Australian Synchrotron)	<input type="text" value="CAP Project Leader"/>	<input type="radio"/>	<input type="text" value="Yes"/>	<input type="radio"/>	<input type="button" value="Send Email"/>
Amanda Costanzo (Australian Synchrotron)	<input type="text" value="CAP Project Leader"/>	<input type="radio"/>	<input type="text" value="Yes"/>	<input type="radio"/>	<input type="button" value="Send Email"/>
Scott Kendall (Australian Synchrotron)	<input type="text" value="CAP Project Leader"/>	<input type="radio"/>	<input type="text" value="Yes"/>	<input type="radio"/>	<input type="button" value="Send Email"/>
Glyn Devlin1 (Australian Synchrotron)	<input type="text" value="CAP Leader"/>	<input checked="" type="radio"/>	<input type="text" value="Yes"/>	<input type="radio"/>	<input type="button" value="Send Email"/>
Donna Popov (Australian Synchrotron)	<input type="text" value="CAP Project Leader"/>	<input type="radio"/>	<input type="text" value="Yes"/>	<input type="radio"/>	<input type="button" value="Send Email"/>

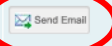
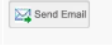
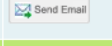
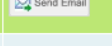
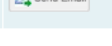
CAP SUBMISSION PROCEDURE

Invite Principal Investigators to Create a Project Proposal Against this CAP

Click the 'Send Email' button for each CAP Principal Investigator added to notify them that they must submit a CAP Project proposal against this CAP; the email notification will provide the CAP Principal Investigators with the link required to create the Project proposal. Each time you click a 'Send Email' button you will receive a pop-up confirmation that the email was sent; refrain from clicking the next button before this notification has been shown. Please note that the CAP Program Leader will be copied on these emails. The CAP Program Leader should click the 'Send Email' button against their own name so that they receive the link to create a Project proposal.

Add Co-Proposal Scientist

Displaying 1-5 of 5 result(s).

Name	User Role	Is Coordinator	Attending Exp		
Cathy Harland (Australian Synchrotron)	CAP Project Leader	<input type="radio"/>	Yes	<input type="radio"/>	
Amanda Costanzo (Australian Synchrotron)	CAP Project Leader	<input type="radio"/>	Yes	<input type="radio"/>	
Scott Kendall (Australian Synchrotron)	CAP Project Leader	<input type="radio"/>	Yes	<input type="radio"/>	
Glyn Devlin1 (Australian Synchrotron)	CAP Leader	<input checked="" type="radio"/>	Yes	<input type="radio"/>	
Donna Popov (Australian Synchrotron)	CAP Project Leader	<input type="radio"/>	Yes	<input type="radio"/>	

CAP Project and Shift Request Summary

Upon creation of the CAP proposal, there will be no associated CAP Projects and as such the 'Beamline Tab' will show 'No Results Found':

Home » CAP8130: Test CAP Proposal 7/4/14

Experiment	Researchers	Beamline	Submit						
CAP8130: Test CAP Proposal 7/4/14									
<p>Requested Shifts Summary</p> <p>Requested Shifts Summary</p> <table border="1"> <thead> <tr> <th>Proposal</th> <th>Leader</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td colspan="3">No results found.</td> </tr> </tbody> </table>			Proposal	Leader	Status	No results found.			<p>You can ask for only one beamline. Two drop down lists are provided at the bottom of the page to request particular operating modes of the beamline, sample environments, detectors etc, and off-line laboratory facilities. When bringing your own equipment please provide as much detail as possible, including any possible hazards.</p> <p>CAP Proposals</p> <p>This page provides an overview of all of the CAP Project proposals that have been generated under the CAP8130: Test CAP Proposal 7/4/14.</p>
Proposal	Leader	Status							
No results found.									

AT THIS STAGE YOU WILL NEED TO SAVE THE PROPOSAL AND WAIT UNTIL ALL CAP PROJECT PROPOSALS HAVE BEEN GENERATED BY THE CAP PRINCIPAL INVESTIGATORS

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CAP SUBMISSION PROCEDURE

If you try to submit the CAP Proposal at this stage you will get the following error message:

Home » CAP8130: Test CAP Proposal 7/4/14

Experiment Researchers Beamline **Submit**

CAP8130: Test CAP Proposal 7/4/14

Submit

When your proposal is ready for submitting, do so here.

✓ All required Information has been added:

• No project proposal have been created

<< Back Save Cancel Submit

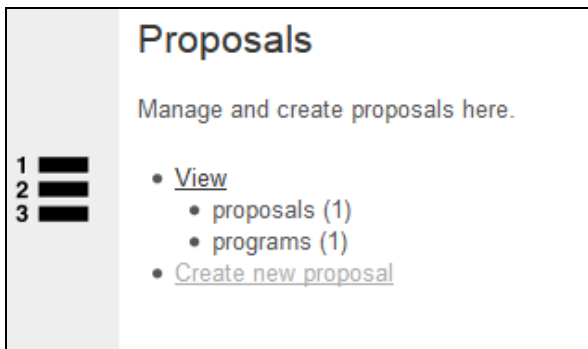
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CAP SUBMISSION PROCEDURE

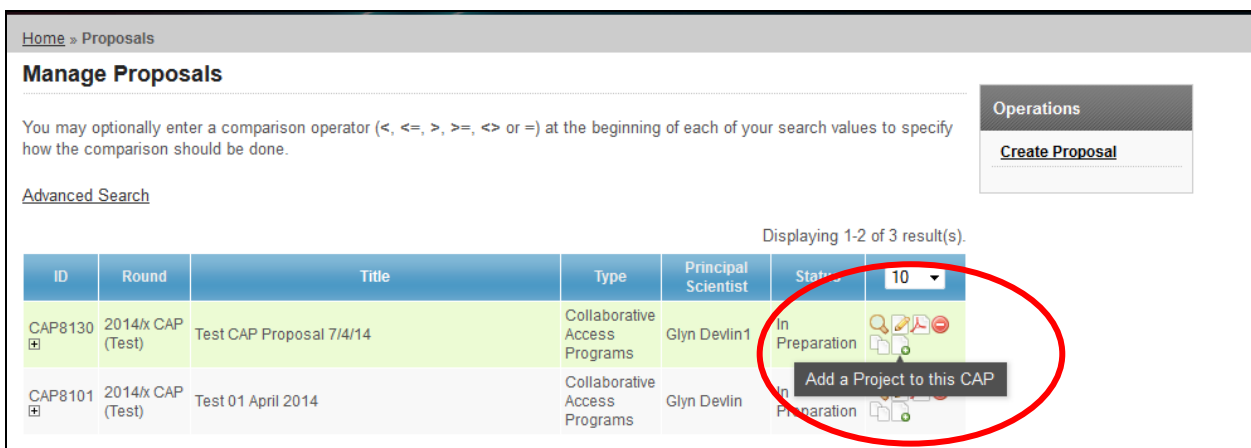
ADDING A PROJECT TO A CAP (CAP PRINCIPAL INVESTIGATORS)

Once a CAP Principal Investigator has been added to the CAP proposal they must associate one or more CAP Project proposals with the CAP proposal. The simplest way to do this is by following the link send in the email notifying the CAP Principal Investigator of their addition to a CAP.

Alternative, the Principal Investigator can navigate to 'View' their proposals from the Dashboard:



Locate the appropriate CAP proposal that has been created by the CAP Program Leader and click the 'Add a Project to this CAP' symbol  on the right hand side:



CAP SUBMISSION PROCEDURE

Add the title of the Project; the instrument and round should be selected automatically. Confirm that the 'Parent Proposal' listed is the correct CAP proposal:

Beamtime Proposal Stage 1:

Expt Title *

Instrument

Equipment Set Id

Show/Hide Details of Available Instruments

Round Details

Round *

Parent Proposal

Show/Hide Details of Current Rounds

Total 1 result(s).

Proposal Round	Description	All Dates	Facility Name
2014/x CAP Project (test)	Test round for the generation of CAP Projects	Proposal 30/04/2014 Start Date 01/06/2014 End Date 30/06/2014	Australian Synchrotron

Next > Cancel

Click 'Next' and create the proposal. You will be taken to the 'Experiment' tab of the proposal:

Home » CBR8134 (8130-4): Test CAP Proposal 7/4/14

Experiment Researchers Beamline Samples Figures Submit

Complete all of the questions on the 'Experiment' tab.

Adding CAP Staff Members to your Project

On the 'Researchers' tab click the 'Add Co-Proposal Scientist' button to add your group/team members (as appropriate). Enter a family name or an email address to search for the co-proposer in the Portal. When you have identified the correct researcher, click 'use' to add them to the proposal, ensuring that the appropriate user role is selected from the dropdown.

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CAP SUBMISSION PROCEDURE

Detail view x

Create Proposal Scientist

1 If you know the email of the person you want to add, as it was registered in this portal, please enter it here.

Email address

1 Otherwise, enter the first letters of their surname.

Surname

Search

We have found one or more records that may correspond to this information. If the details are contained here, please select that record. Otherwise, you may choose to create a new account (or search again).

Total 1 result(s).

Name	Active Account	
David Aragao (Australian Synchrotron)	Yes	use

If you cannot find the account of the person you were searching for, you may create it yourself.

Enter New Account Details

User Role *

Attending Exp

Please note that there can only be a single CAP Principal Investigator per Project proposal.

Enter the Shift Requests for your Project

Enter your MX1 and MX2 shift requests on the 'Beamline' tab;

Home » CBR8134 (8130-4): Test CAP Proposal 7/4/14

Experiment Researchers **Beamline** Samples Figures Submit

CBR8134 (8130-4): Project 4

▶ MX* (MX1)

▶ MX* (MX2)

<< Back Save Cancel Next >>

You can ask for only one beamline. Two drop down lists are provided at the bottom of the page to request particular operating modes of the beamline, sample environments, detectors etc, and off-line laboratory facilities. When bringing your own equipment please provide as much detail as possible, including any possible hazards.

CAP SUBMISSION PROCEDURE

Click the MX*(MX1) or MX*(MX2) tabs and select a shift request from the dropdown:

MX* (MX1)

Show/Hide Equipment Details

Displaying 1-7 of 7 result(s).

Parameter	Values
Source	AS Bending Magnet / in-vacuum undulator (U22)
* Energy Range	5 - 18 keV / 5.5 - 28 keV
Monochromator Type	Si <111> Sagittal focus / Si <111> & Si <311>
Resolution dE/E	1.4×10^{-4} / 1.4×10^{-4}
Flux (Photons/sec)	2×10^{11} / 4×10^{12} at 12.6 keV
Beam Size Focused (HxV)	0.15 x 0.15 mm (fixed) / 0.01 x 0.02 - 0.1 x 0.1 (variable)
Beamline Scientist	Dr Tom Caradoc-Davies

Experimental Setup

No. Shifts Requested: 6 (2 days)

Lab Ancillary requested

Biochemistry Preparation Lab Add

Ancillaries, Detectors, Sample Environment

No results found.

MX* (MX2)

Please note that this shift request is for 12 months.

Enter your Samples and Figures

Enter your samples and upload any supporting figures on the 'Samples' and 'Figures' tabs, respectively.

Home » CBR8134 (8130-4): Test CAP Proposal 7/4/14

Experiment Researchers Beamline Samples Figures Submit

Please add a sample for each distinct group of samples.

Also please create a sample entry called "User Chemicals" for chemicals that you will bring with you for your experiment.

CBR8134 (8130-4): Project 4

Samples

Add Sample

Sample Description / Name	Hazardous	Hazards
No results found.		

<< Back Save Cancel Next >>

These pages are used to provide details of the samples and chemicals that you bring with you. A brief description and summary of the safety issues associated with each distinct group of samples must be provided.

For information about CAS numbers see the [CAS Registry web page](#).

CAP SUBMISSION PROCEDURE

Finalising the CAP Project Proposal

Once you are satisfied that all aspects of the CAP Project Proposal are correct, you can finalise the proposal. Please note that, once finalised, the CAP Program Leader will still be able to edit your proposal. Upon finalisation the CAP Principal IN

Home » CBR8134 (8130-4): Test CAP Proposal 7/4/14

Experiment | Researchers | Beamline | Samples | Figures | Submit

CBR8134 (8130-4): Project 4

Submit

✓ All required Information has been added:

When your proposal is ready for submitting, do so here.

<< Back
Save
Cancel
Finalise

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CAP SUBMISSION PROCEDURE

SUBMITTING THE CAP PROPOSAL (CAP MAIN INVESTIGATOR)

Before submitting the CAP proposal the CAP Program Leader must review the Project proposals associated with the CAP to ensure that they are completed to the Program Leader's satisfaction and are in the 'Finalised' status.




To do this navigate via the Portal Dashboard and view your CAP proposal. Update the CAP proposal by clicking the 'Update' link:

Manage Proposals

You may optionally enter a comparison operator (<, <=, >, >=, <> or =) at the beginning of each of your search values to specify how the comparison should be done.

[Advanced Search](#)

Displaying 1-10 of 109 result(s)

ID	Round	Title	Type	Principal Scientist	Status	Beamline	10
CAP8170	2014/x CAP Proposals (Test round ONLY)	CAP test again	Collaborative Access Programs	Cathy Harland	In Preparation	MX*	   update

Navigate to the 'Beamline' tab. Once the CAP Project proposals have been generated you will see a summary of the Project details including the total shift requests for the CAP:

Experiment Researchers **Beamline** Figures

CAP8170: CAP test again

▼ Requested Shifts Summary

Requested Shifts Summary

Displaying 1-5 of 5 result(s).






Proposal	Leader	Status	Shifts Requested: MX* (MX1)	Shifts Requested: MX* (MX2)
CBR8171 (8170-1): Test project	Cathy Harland	Finalised	0	10
CBR8172 (8170-2): Test project	Cathy Harland	Finalised	3	5
CBR8173 (8170-3): Test CAP project	Tom Caradoc-Davies	Finalised	7	11
CBR8174 (8170-4): again!	Cathy Harland	Finalised	8	0
CBR8175 (8170-5): Test	Donna Popov	In Preparation	0	0
<i>Total: 18</i>			<i>Total: 26</i>	

CAP SUBMISSION PROCEDURE

An attempt to submit a CAP proposal that is associated with CAP Project proposals that are not in the 'Finalised' status will elicit the following error message:

Experiment	Researchers	Beamline	Figures
CAP8170: CAP test again			
Submit			
<p>! You cannot submit this proposal, because of the following error condition(s):</p> <ul style="list-style-type: none"> The following project are not finalised: <ul style="list-style-type: none"> CBR8175 (8170-5): Donna Popov - Test 			

The CAP Program Leader can modify and finalise the CAP Project proposals on behalf of the CAP Principal Investigators by clicking on the 'Update' icon next to each project:

Experiment	Researchers	Beamline	Figures		
CAP8170: CAP test again					
Requested Shifts Summary					
Requested Shifts Summary					
Displaying 1-5 of 5 result(s).					
Proposal	Leader	Status	Shifts Requested: MX* (MX1)	Shifts Requested: MX* (MX2)	
CBR8171 (8170-1): Test project	Cathy Harland	Finalised	0	10	
CBR8172 (8170-2): Test project	Cathy Harland	Finalised	3	5	
CBR8173 (8170-3): Test CAP project	Tom Caradoc-Davies	Finalised	7	11	
CBR8174 (8170-4): again!	Cathy Harland	Finalised	8	0	
CBR8175 (8170-5): Test	Donna Popov	In Preparation	0	0	
			Total: 18	Total: 26	

DELETING A PROJECT PROPOSAL

If there is a need to remove a Project from this CAP it can be deleted from the 'My Proposals' page. From the 'My Proposals' view, locate the CAP proposal from the list and expand its selection by clicking on the (+) symbol next to the proposal ID (in the left-most column); this will show a list of all associated projects. To delete a Project click the (-) symbol in the right-most column in the row corresponding to the Project you wish to remove. Please note that once deleted a Project can not be recovered. Once a Project has been finalised by the CAP Principal Investigator it can not be removed. If you need to remove a Project that has been finalised please contact the [User Office](#).

CAP SUBMISSION PROCEDURE

Once the CAP Program Leader is satisfied with all of the CAP Project proposals the CAP Proposal can be submitted.

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